

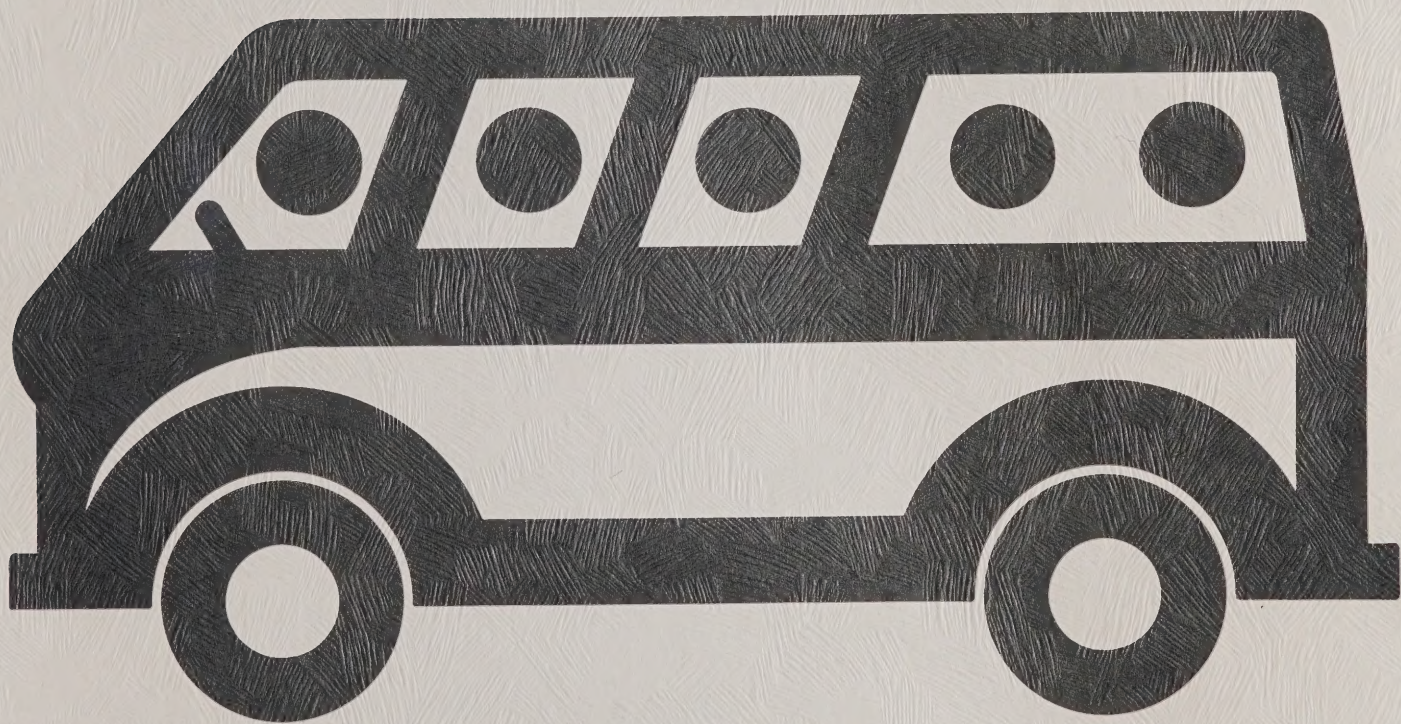
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# VANPOOL IMPLEMENTATION HANDBOOK



A Guide for Companies




Ministry of  
Transportation and  
Communications

Ministry  
of  
Energy



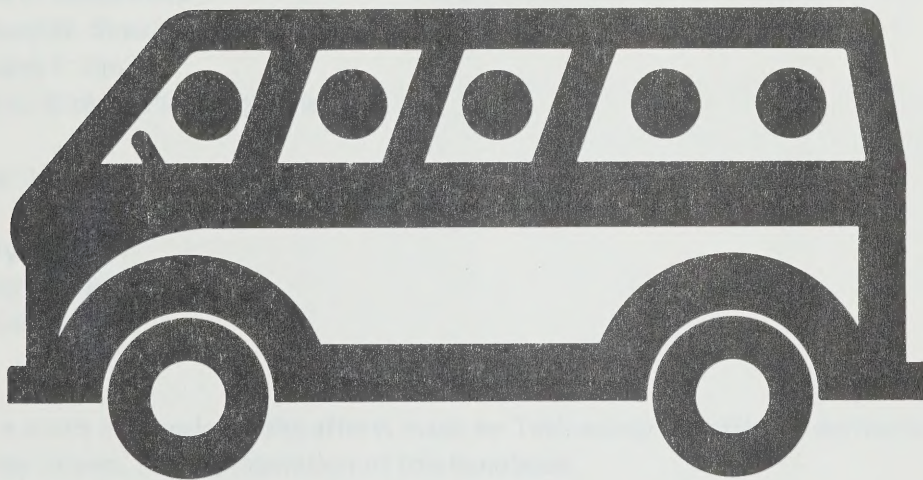




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# VANPOOL IMPLEMENTATION HANDBOOK



## A Guide for Companies



Ministry of  
Transportation and  
Communications

Ministry  
of  
Energy



Energy  
Ontario



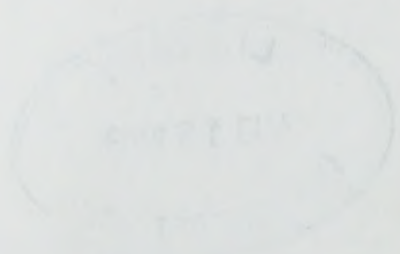
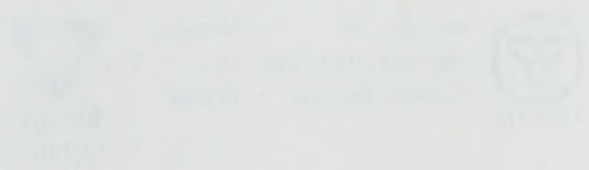




# VANPOOL IMPLEMENTATION HANDBOOK



A Guide for Companies



# Introduction

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## Acknowledgements

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# Introduction

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## What is Vanpooling?

Vanpooling is a first-class method of commuting that more than 40,000 people in North America are enjoying today. These people travel to and from work in the comfort of luxury passenger vans, without the strain of driving in rush hour traffic.

A company usually begins by purchasing or leasing a few vans. The vans usually seat 12 people and are driven by fellow employees. The low monthly fares collected from each rider (driver excluded) cover the capital and operating costs.

Since its beginnings, Vanpooling has been accepted and implemented by more than 200 companies in North America. In May 1978 3M Canada began with 5 vans at their facilities in London, Ontario. Within 8 months another 5 vans were on the road. In March 1977 Chrysler Canada began with 10 vans at their plant in Windsor. Now Chrysler has 30 vans operating in the Windsor area and 4 have been started in Ajax.



Courtesy of 3M Canada, London, Ontario.





Courtesy of Chrysler Canada, Windsor, Ontario.

The many reasons for Vanpooling's success can be grouped into the benefits received by the employer, the employee and the community.

#### Employer Benefits

Vanpooling makes good business sense, saves substantial amounts of energy, and is an attractive alternative to travelling in one's own car. Vanpooling is attractive because the program can be as self-supporting as you wish, and its benefits can be obtained at minimal cost. Some of the major benefits to the employer are listed in the following:

- reduced parking demand. This avoids the construction of new facilities and saves on snow removal and other maintenance costs.
- improved employee productivity because long distance commuters can arrive to work relaxed, and better prepared for the day.
- improved punctuality.
- reduced absenteeism.
- improved employee relations.
- improved lines of communication among employees.
- an expanded and more stable labour market due to the increased availability of reliable transportation to and from work.
- publicity gained through advertising by using the company name on the outside of the vanpool vehicles.
- good corporate image.



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## Employee Benefits

Employees find vanpooling to be a very attractive method of commuting to work. Possible benefits include:

- reduced travel costs.
- a safe, reliable and relaxing trip to work.
- preferential parking space.
- for the driver, a free trip to work and the use of the van during non-working hours.
- Vanpoolers often can avoid the purchase or replacement of a second car.

## Community Benefits

Vanpooling has the potential for dramatically reducing our consumption of non-renewable energy resources. An average vanpool takes about 8 cars off the road. Each vanpool, therefore, saves about 5,000 gallons of gasoline a year and also helps reduce traffic congestion and air pollution.

## How to Get Started

This handbook has been prepared to help you implement a vanpooling program. First, consider the potential benefits for your company. A *preliminary study* will indicate how a program can be established by your company, and the potential for vanpooling among your employees. If the preliminary study produces a positive recommendation, a *pilot program* should be established.

There are 3 *major planning principles* to consider in a vanpooling operation:

- Management commitment.
- Simple administration.
- Low fares.

These principles should play an important role in your preliminary study and the development of a pilot program. Vanpooling depends upon voluntary support of employees and these planning principles encourage employee support and enthusiasm for the program.

## The Preliminary Study

Once the company executive has decided to evaluate vanpooling, someone must be delegated to carry out the preliminary study. This *evaluator* will want to initiate discussions with departments such as Personnel, Employee Relations, Insurance, Accounting, Financial, Legal; Administrative Services, Transportation, and Building and Grounds to determine the range of operating strategies available. Initial concerns relate to: the purchase or lease of the vans; the potential use for employees; insurance and legal questions; the degree of company support necessary and available; benefits to the employee and the company's public relations program; and the availability of maintenance facilities, and preferential parking.

Although the information contained in this handbook is directed towards the implementation of the pilot program, much of it will also serve as a guide for the evaluator conducting the preliminary study.



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After the evaluator has developed a practical organizational framework for a vanpooling operation and has shown that the travel patterns of many employees are suitable for vanpooling, the executive defines a pilot program based on the findings of the preliminary study.

### **The Pilot Program**

A vanpool *administrator* should be appointed to run a small pilot program. The administrator is often drawn from the personnel department of a company, but individuals in administrative services or transportation could be equally suitable for this position.

The main advantage of keeping the pilot program small (a maximum of 5 vans even in a large company) is that the administrator will be able to go through the implementation process once on a limited scale and make adjustments and improvements to the operation, based on the experience of the pilot project, before going into a full-scale operation.

If the pilot program is successful, your company will want to consider expansion of the program to allow more employees to participate. The vanpool administrator could oversee this expansion as well as adjust the system based on the experience gained through the pilot program.

### **The Handbook**

This handbook defines the steps required to develop and implement a successful vanpool program. The information has been organized into the following Sections:

1. Organizing Your Program
2. Determining & Promoting Ridership
3. Selecting Vanpool Drivers
4. Acquiring Vans
5. Calculating & Collecting Fares
6. Organizing the Vanpool
7. The Legal Situation
8. Sample Forms

### **Government Assistance**

There are many approaches and many issues to consider when setting out to establish your program. This handbook provides a basic guide. Further technical assistance can be provided by The Ministry of Transportation and Communications. The Ministry has a comprehensive reference guide which details all aspects of vanpooling. A handbook for carpooling is also being prepared, and assistance can be provided to develop a more comprehensive program which includes this concept.



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Downsview, Ontario  
M3M 1J8

Phone: (416) 248-3771



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# Organizing Your Program

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This section outlines the initial policy decisions to be made during your preliminary study and the more detailed operational decisions required in preparation for the pilot program.

## 1.1 Preliminary Decisions

During the course of the preliminary study some initial decisions must be made. These should be made in accordance with major planning principles set down in the Introduction (i.e., management commitment, simple administration and low fares). The initial decisions will relate to areas such as administrative and maintenance support, van acquisition and maintenance, insurance coverage, and the use of vans for business purposes.

### General Support

Each company must consider the administrative, financial, and promotional support which can be offered to vanpools. Company support is most effectively provided by those offices which already perform a similar function (i.e., payroll deductions). Every company provides, without charge, the accounting and payroll functions necessary to handle operating costs and collection of passenger fares. Where companies have existing vehicle fleets, maintenance is often provided at favourable rates. Similarly, it may be possible to obtain low-cost insurance coverage through the company's insurance policy. Virtually every company provides the administrator's time free of charge.

Some companies provide greater financial support by absorbing interest costs incurred through purchase of the vans, while others provide free rides during the first few weeks of a vanpool's operation.

As a means of promotional support, many companies provide the convenience of reserved parking. Reserved parking can be a strong incentive to employees as it serves as a visible demonstration of management's commitment to the program. Some companies extend further benefits by providing work schedule benefits to poolers. Companies also demonstrate their support by using company newsletters, bulletin boards and any other available media to inform employees about the program.

### Van Acquisition

There are several viable options for van acquisition and ownership. Acquisition can be by purchase or lease; the owner or lessee can be the company, a commuter association, or an individual. The options should be thoroughly explored and the costs developed to help in the selection process.

If the company already has a fleet, then it will probably be least expensive and most straightforward to add the vans to the existing fleet. Company-purchased or leased vans may still be the best option even if the company does not have a fleet. Company-owned or leased vans can demonstrate the firm's commitment to vanpooling and will instill confidence in the riders that the program will be properly operated and monitored.

If your company is not in a position to buy or lease the vans, then you will want to consider a commuter association or an individual owning or leasing the

1.0  
1.1



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vehicles. In this way, your company can initiate a vanpool program without direct financial involvement in its operation. For this situation, the company can provide substantial incentive by removing the financial risk from the individual or association by guaranteeing any loans or covering any penalty clauses for early termination in lease agreements.

#### **Using the Vans for Company Business**

Your company may be able to use the vans for business purposes during the day. This will lower van fares (i.e., the company may cover an appropriate portion of the operating and fixed costs) and is therefore desirable provided that the business use does not interfere with operation of the vanpool.

#### **Insurance Coverage**

For company-owned or leased vans you could establish the van's insurance as part of your fleet policy. Also, determine whether your general liability policy will provide extended coverage. Establish minimum insurance requirements for vans that are operated by individuals or associations. The vans should be appropriately insured for situations such as personal use by the driver, or business travel.

#### **Driver Incentive**

In most vanpools, the driver rides free and has the use of the van on evenings and weekends. In addition, the driver may receive part or all of the fares above a break-even point, although this practice is generally being replaced by lowering the fares when riders are added.

#### **Promotion and Communications**

There may be several possible channels of communication open between management and employees (i.e., company newsletter, staff memos, meetings). One or more of these should be selected as a continual communications link primarily for encouraging employees to vanpool. Other methods could be used as secondary sources of encouragement.

### **1.2 Preparation for the Pilot Program**

The vanpool administrator should familiarize himself or herself with all the preliminary decisions that have been made for the preliminary study, and closely review them during the period of detailed organization for the pilot program. At the same time the administrator will seek specific advice and information from departments which have experience in key areas such as personnel, legal, public relations, accounting, and transportation.

Detailed consideration of appropriate questions is provided in the following sections. The checklist below capsulizes the frequent questions:

- How can the public relations value of vanpooling be realized?
- How can you communicate most effectively with the employees?
- Can vanpooling be integrated with carpooling operations and can they be promoted simultaneously?



- 
- Where do employees who are potential vanpoolers live, and what are their work schedules?
  - Can preferential parking be made available?
  - What incentives and benefits should be made available to drivers?
  - Have all the areas of potential company support been investigated?
  - What criteria should be used in selecting drivers?
  - Does company policy indicate that it is preferable to purchase or lease vans?
  - Are there ways of lowering the van fares?
  - Can the vans be ordered before drivers, routes, and passengers are selected? (This will avoid vehicle delivery delays which can disrupt a vanpool before it gets started.)
  - How will vehicle maintenance be handled?
  - Does the company have a fleet insurance policy that could be expanded to include vans?
  - What are the tax, legal, and liability implications of vanpooling and how will they be treated?
  - Is the administration of the program effective but simple?

1.3

### **1.3 Program Review and Expansion**

The pilot program should be successful if the major planning principles of management commitment, low fares, and simple administration have been followed.

Review the program and revise any areas needing improvement. During this review, a survey of the participants in the pilot program should be made to evaluate the new service and to obtain suggestions for making it more convenient and attractive for the riders.

There may be good potential for expanding the number of vanpools. If a large expansion is contemplated, you will need to consider potential savings based on a larger scale operation, suitability of your accounting techniques for monitoring the expanded program, and a promotional campaign to attract new participants.

Once employees have indicated their interest in the program, the lines of communication to the administrator and management should be kept open. Being able to respond actively to the enthusiasm of current and potential vanpoolers helps assure a successful program. Your goal is to obtain maximum possible ridership with a minimum of administrative attention.



# 2

## Determining & Promoting Ridership

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This section deals with estimating the market for vanpooling and generating employee interest. Subjects included are:

- Identifying and estimating the market for the preliminary study.
- Promoting vanpooling in your company.
- Conducting the employee interest survey.

### 2.1 Identifying Potential Markets

Identifying potential markets is an integral part of both the preliminary study and the pilot program. The following criteria can be used as indicators of a potential market for vanpooling:

- A longer than average commuting distance. Generally, persons travelling distances in excess of 25 km have produced the most successful vanpools.
- A sufficient number of employees in the same area or along a commuting route (approximately 15 people).
- Lack of transit services.
- Groups or individuals who have expressed an interest in vanpooling.

For purposes of the preliminary study an estimate of the market is made. Using addresses or postal codes available through the personnel records, the number of employees who commute in excess of 25 km can be determined, and theoretical routes can be examined to conclude whether or not there is a potential market. It is important to remember that for success with short trip distances, convenient pick-up spots be available. For a 25 km one-way trip pick-up time must be kept to a minimum.

### 2.2 Methods of Identifying Actual Markets

One of the initial stages of the pilot program is to approach employees and determine their interest in vanpooling. Where strong market areas have been identified in the preliminary study, you may wish to concentrate your efforts solely on employees from those areas, while at the same time promoting ridesharing among all employees. Where the potential markets are not so well defined, the approach to employees may be company wide.

There are various methods for identifying high potential areas and employee interest. The following 4 methods have been successfully used by companies:

- 1/ Develop and circulate a company letter of endorsement, an information flyer and an employee response card to identify interested employees. (Samples of these are included in Section 8.)
- 2/ Use data from an existing carpool matching effort to identify high potential areas.
- 3/ Identify heavily travelled commuting routes or corridors leading to your work location and advertise a number of these as vanpool routes.
- 4/ Advertise first for drivers, pointing out the special benefits available. Give selected individuals the responsibility of assembling a route and passenger list using personnel records and personal contact.

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The method best suited for your company depends on several factors such as the number and type of employees, and the personnel and promotional resources available. Regardless of the method chosen, keep in mind that the immediate aim is to choose pilot routes, and not to find a vanpool route for every employee. Method 1 has been used most frequently and will be used as an example in the remainder of this Section.

## **2.3 Promoting the Pilot Program**

### **Advance Publicity**

Use your company newsletter, bulletin boards, and any other available media to inform the employees about the concept of ridesharing and to provide some details of your pilot program. An endorsement memorandum from the company president is useful at this stage. Promotional information should define:

- General purpose and benefits.
- Examples of fares, and potential savings. (Sample information is included in Section 8.)
- Opportunity to obtain less expensive, non-commuting auto insurance rates. Suggest that vanpoolers check with their own agents.
- Degree of company support.
- Principles of fare calculation and payment.
- Driver's responsibilities.
- Benefits to the driver and back-up drivers (perhaps include a free ride for drivers and use of the van during evenings and weekends).
- The comfort and relaxation of being a vanpool passenger.
- Community benefits.

### **The Employee Interest Survey**

Distribute to your employees an information flyer which reiterates the concept and some details of vanpooling. An interest response card can be designed as a tear off portion of the flyer. An alternative is to hold short meetings of small groups of employees. Vanpooling should be explained and an employee interest form should be made available. A fully equipped demonstrator van from a local dealer provides another effective promotional display that can help establish vanpooling as a first class mode of travel, comparable in comfort to commuting by car.

### **Follow-Up Publicity**

Using your newsletter and bulletin boards you should conduct a follow-up publicity campaign to remind employees about joining the program. Employee interest forms should be readily available.

Once the program is underway, vanpooling will promote itself. The vans and their riders are continuing advertisements of the concept.

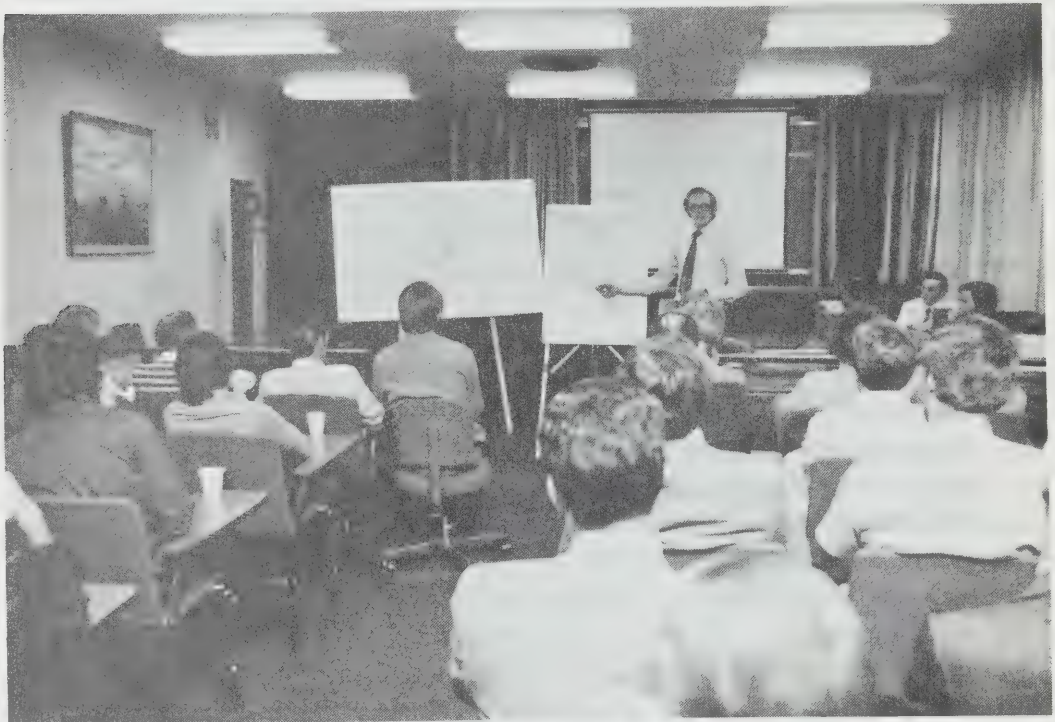
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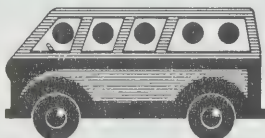
### **The Next Steps**

When an area has demonstrated sufficient interest to fill a van, your next steps should include selecting a suitable driver (Section 3), assembling the potential van-pool participants, and establishing a preliminary route (Section 6).



**An informational meeting of potential Vanpoolers held at MTC.**

# VANPOOLING VANPOOLING



## What is it ?

A group of employees commuting together in the comfort of a luxury passenger van. These employees pay a low monthly fare which covers operating and capital costs. The van is owned or leased by the employer. The driver is a fellow employee, who rides free.

More than 40,000 people across North America are enjoying this new type of first-class travel directly from home to work. Each day, in the company of a few friends and neighbours, they obtain door-to-door service. They escape the headaches of driving in heavy traffic or bad weather. Best of all, they save hundreds of dollars per year!

## How Will It Work ?

Our company will obtain a few vans and assign each one to a group of 10 to 12 employees who live in the same neighbourhood or along a common route. One person in the vanpool group will be chosen to drive and maintain the van. Other members of the vanpool will pay a low monthly fare, which is less than the cost if one drives alone.

## What is in It for You ?

Think of the advantages. People join and stay with vanpooling because of

### Comfort and Convenience

- convenience of door-to-door service
- release from the stress and tensions of driving
- comfort of a luxury ride (carpeted, air conditioned)
- reliability of the service
- freedom to read, work, sleep or just relax and enjoy the company of fellow vanpoolers

### Savings

- significant savings over the cost of operating their own car
- reduced wear on their car
- can eliminate the need for a second car
- reduced insurance rate - car used for casual use only\*
- energy savings

## Who Will Drive ?

Conscientious drivers make vanpooling work. Each driver will be a fellow employee selected for his or her dependability and safe driving record. In short, someone who can be relied upon. Drivers (and designated back-up drivers) are responsible for being punctual and for keeping the vans clean and well maintained. In exchange drivers

- commute for free
- have use of the van at night and on weekends for just the cost of gas and oil
- retain the fare of the 11th passenger

## What We Will be Doing

We are starting small, with just a few vans. Informational meetings have been scheduled so that you can learn more about vanpooling in general and our program specifically. One of the first steps will be the recruiting of vanpool drivers - they are the key to the success of the program. We also expect to have a demonstration van on display. You are cordially invited to come and 'kick the tires'.

So, if you are interested, fill out and return the attached form Today.

Informational meetings are scheduled for

Time: 10:00 a.m. Time: 10:00 a.m.  
Date: October 17, 1978 Date: October 18, 1978

Location: EAST BUILDING BOARDROOM

## Van Fares

A single monthly fare, paid in advance, covers all costs associated with the operation of the vanpool. The following table compares typical vanpool fares with the cost of operating a private car.

DAILY ROUND TRIP	TYPICAL MONTHLY VANPOOL FARE*	COST OF DRIVING ALONE**	MONTHLY SAVING
40 km	\$34	\$ 43	\$ 9
80 km	\$40	\$ 86	\$ 46
120 km	\$46	\$129	\$ 83
160 km	\$52	\$172	\$120

\*Note: Exact monthly fares will depend on the cost of the vehicles and the number in each pool.

\*\*Gas and maintenance cost only.

## \$ SAVINGS \$

Long distance commuters have the most to gain from vanpooling. For example, a commuter who makes an 80 km round trip will spend \$51/month for gasoline alone (assuming 30 km/gal. and 95¢/gal.) Add to that the cost of oil changes, maintenance and tire replacement and the cost goes up to \$86/month - not including the cost of the car, depreciation, insurance and annual registration. For one-way trips longer than 40 km, vanpooling is cheaper than a 2-person carpool and, when comfort and convenience are considered, vanpooling is an attractive alternative to large carpools as well.

## Second Car ?

The biggest savings for vanpoolers can come from selling or avoiding the purchase of a second car. No longer having to own and insure a second car, one can save more than \$1,000 per year. The following table shows the typical cost of simply owning a car:

### ANNUAL FIXED COST OF OWNING A CAR

	\$3000 CAR	\$6000 CAR
DEPRECIATION (23%)	\$ 690	\$1380
INTEREST (10%)	\$ 300	\$ 600
INSURANCE	\$ 200	\$ 300
REGISTRATION	\$ 45	\$ 60
TOTAL YEARLY COST	\$1235	\$2340

## Energy Savings

In addition to saving you money, vanpooling is also a significant energy conservation measure. By taking up to 10 cars off the road, each van saves about 5000 gallons of gasoline each year, perhaps more. Vans are very roomy inside but they are the same width and over a foot shorter than a full-sized station wagon.



NAME \_\_\_\_\_  
HOME ADDRESS \_\_\_\_\_  
CITY \_\_\_\_\_  
POSTAL CODE \_\_\_\_\_  
OFFICE PHONE \_\_\_\_\_  
USUAL WORK HOURS \_\_\_\_\_ to \_\_\_\_\_  
FLEXIBLE HOURS ☐ YES ☐ NO

### I AM INTERESTED IN VANPOOLING AS A:

(Check as many as you wish.)

- ☐ Van driver
- ☐ Back-up driver
- ☐ Passenger
- ☐ I would like more information

### I PLAN TO ATTEND THE MEETING:

- ☐ On Tuesday, October 17th
- ☐ On Wednesday, October 18th
- ☐ Neither

### MY PRESENT METHOD OF TRAVEL TO WORK IS:

- ☐ Drive alone
- ☐ Drive or ride with others
- ☐ Public transit
- ☐ Other .....

### PLEASE DETACH AND RETURN TO:

Mr. Peter Dalton,  
Vanpool Administrator,  
3rd Floor, Central Building,  
Downview  
(phone: 248-3771)



# 3

## Selecting Vanpool Drivers

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The driver selection process includes:

- Driver selection criteria — a checklist of desirable driver characteristics and qualities.
- Driver safety — driving records and the defensive driving course.
- Driver responsibilities.
- Driver incentives — the benefits available to drivers and the duties to be fulfilled.

### 3.1 Introduction

Selection of conscientious and responsible employees as drivers is one of the keys to a successful vanpooling operation. Most of the details of individual van operation, such as maintaining the break-even passenger level, establishing the route, bookkeeping, fare collection, and van servicing are handled by each driver. In turn, he or she normally receives several benefits.

Persons who have expressed an interest in driving a vanpool should be interviewed personally and made aware of the benefits and responsibilities. A sample Van Driver Application is included in Section 8 to help you structure your interview with prospective drivers.

In selecting your drivers, remember that their good driver performance records will reflect favourably on the program and on your firm.

### 3.2 Driver Selection Criteria

Drivers must have a Class F license to drive a van with more than 10 seats. The following lists the additional criteria for selection. The Van Driver Application form can be used to obtain this information.

- Good driving record. Set standards for how many demerit points, traffic violations or accidents you consider acceptable.
- Interest and good attitude toward the program.
- Suitable geographical location in relation to potential passengers.
- Regular work hours with a low amount of overtime work normally required. The van must depart on time.
- Good work attendance record, low absenteeism and punctuality are vital.
- Positive recommendation from supervisor. Determine if the added tasks will interfere with work and if the person is capable of handling the responsibility of managing the pool.
- Good mechanical aptitude.
- Age and marital status should be consistent with the most favourable insurance rates.
- Ability to provide a safe parking place for the van at own residence.
- Experience in driving a van and successful completion of a defensive driving course. (Not compulsory, but are assets.)

If you must choose from several qualified candidates, be sure to encourage the others to join pools as back-up drivers. Rejected candidates could receive primary consideration for additional routes in their neighbourhoods. You might also encourage enthusiastic candidates to develop new vanpool routes of their own.

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3.2

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### **Driving Records**

A Class F licence ensures a certain level of competence and safety; however, it is also advisable to check an applicant's driving record. For a handling charge of \$3.00, the Ontario Ministry of Transportation and Communications will provide driving records. These records include those infractions which lead to demerit points (e.g., "driving under the influence") or suspension or revocation of a licence. Driving records do not include any information about accidents.

## **3.3. Driver Safety**

### **The Defensive Driving Course**

To help assure their employees' safety, some companies require vanpool drivers and back-up drivers to attend a Defensive Driving Course (DDC). This driver improvement program is based on the concept of accident preventability through understanding how to recognize and avoid accident-provoking situations. Eight hours of classroom instruction are scheduled for groups of 20 persons at \$15.00 per student. The course is offered through many community colleges and details are available from the Ontario Safety League.

If a firm sees a need for offering the DDC to its employees on a regular or continuing basis, as do many for fleet drivers, it is recommended that the firm train its own instructors through the Instructor Development Course available through the Ontario Safety League. This \$60.00, 3-day session prepares individuals for teaching the DDC at their own firms.

## **3.4 Driver Responsibilities**

The driver's responsibilities might include:

- Drive the van to and from the place of work, and pick-up and discharge passengers at the place of work and at their homes (or other designated pick-up and drop-off points). Maintain daily, reliable, on-time passenger service.
- Arrange for proper service, maintenance and cleaning of the van as needed.
- Supply a safe place for overnight parking of the van. You may want to specify that this be off-street or even in a garage, especially in winter. Ensure that local by-laws in the area where the van will be stored do not prohibit vans.
- Keep the pool at or above the minimum required number of paying passengers.
- Keep a record of the vanpool's operation, such as distance for commuting, business and personal use and number of paying passengers each week.
- Collect predetermined fares from the passengers on a monthly basis. Either collect and deposit their fares or collect signatures for payment via payroll deduction.

Most firms have their vanpool drivers and back-up drivers sign an agreement that details the duties of the driver and the employer. The Vanpool Driver Co-operative Agreement shown in Section 8 is a compilation of those used by several major vanpool operations. Your firm's legal department should review the sample and tailor it to your specific needs. Certain areas, such as who reports traffic viola-

3.3  
3.4



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tions and who pays the deductible amount if a collision occurs, (this is sometimes the driver's responsibility) should be clearly understood.

### **3.5 Driver Incentives**

Most companies permit the driver to commute for free. They also permit the driver, the back-up drivers and their spouses to use the van for personal trips. The drivers pay a distance charge to cover the van's operating cost. For the driver, the van is a second car without the cost of ownership. Section 5 will help you to establish appropriate rates.

One technique used to keep vans operating economically is to base a van's break-even fare on a less than full van. If the driver fills the van then part or all of the additional fares goes to the driver. This provides a definite incentive to the driver to maintain more than the minimum number of passengers in the van.

At one company the fare is computed on the basis of 10 paying passengers. The driver is required to maintain occupancy at the break-even level and may pocket half the fares from an additional passenger. Other firms set the break-even point at 9 passengers for their 12 seat vans. This provides greater freedom from financial losses and a larger driver bonus.

Another approach is to simply divide the total van operating costs among all the riders (i.e., excluding the driver). This approach provides less incentive to the driver; however, many companies find this is offset by the lower fares that result from splitting costs among 11 riders. In this arrangement there is an incentive for riders to help keep the van full.

3.5

## Acquiring Vans

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There are several decisions to be made when acquiring vans for your program:

- Options available?
- Purchase or Lease?
- Maintenance program?

### 4.1 Overview

One of the strongest incentives to an individual for joining a vanpool is, naturally, the van itself. This Section discusses the van acquisition options and also suggests how to equip the vans. The recommendation is to obtain vans equipped with 12 seats. Fifteen-seat vans are available but are not recommended because they would require a Public Vehicle licence and would have to conform to all the requirements of the Public Vehicles Act. These requirements are considered impractical for vanpooling.

Vanpool programs now in operation have acquired their vans using standard methods. Non-profit or co-operative groups have found it best to purchase their vehicles, although some have leased vehicles when initiating their programs. Companies that already have a vehicle fleet find it simplest to add the vans under the same purchase or lease program. The advantages between purchase and lease are predominantly financial; however, maintenance, back-up vehicles, insurance, and the accounting work your organization prefers must also be considered. Where several choices are available estimate the costs of each and decide which is most suitable.

When selecting optional equipment for your van, keep in mind that the convenience and attractiveness of extra services or options may justify the high initial cost. While low costs naturally result in low fares, a higher initial cost can be absorbed by daily fares. For example, the cost of adding \$100 of optional equipment results in each passenger paying only an additional \$0.01 per day.

### 4.2 Choosing Your Vans

Most vanpool operators have found that a well-appointed van is important for attracting the ridership needed for a successful vanpool program. In terms of safety and comfort, a van can be outfitted so that they are comparable to private cars. To dispel any fears about driving a "big" vehicle; a 12-seat van is the same width and more than a foot shorter than a full-size station wagon.

When choosing the options for the van keep in mind the needs of the vanpoolers. The following options (except for the last 3) are all available on the 12-seat passenger vans made by auto manufacturers.

- V-8 Engine (350 - 360 cu. in.)
- Automatic transmission
- Power steering
- Power front disc brakes
- Steel belted radial tires
- Tinted glass
- Shocks and suspension matched to load
- Exterior rear view mirrors on both sides

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- Instrument gauges
  - Hinge doors
  - Rust proofing
  - Push-out side windows for ventilation
  - Custom interior with carpeting\*
  - Oversize fuel tank\*
  - Air conditioner and heater, with front and rear outlets\*
  - Posi-traction\*
  - AM or AM/FM stereo radio with rear speaker\*
  - Heavy duty battery\*
  - Block heater\*
  - Fire extinguisher
  - First aid kit
  - Flares

\*Inclusion of these items depends upon the climate, length of trip, and preferences of the vanpool.

#### **4.3 Purchasing**

Some employers prefer to purchase their vans and thereby control the internal cost management. Purchasing offers a greater opportunity for company support of specific cost items because a lease cost automatically includes items such as finance charges and the lessor's own business expenses.

The purchase price of vans depends on how many you are buying, your bargaining relationship with the dealer, and the cost of financing. Some manufacturers offer fleet discounts on a case-by-case basis.

If your vans are to be used solely for commuting purposes you can be exempted from paying the federal excise tax. This precludes the incentive of personal use by van drivers.

The 1978 list price for a 12-seat van ranges from \$7,600 to over \$10,000 depending on the option selected. In this handbook, sample cost calculations are based on a purchase price of \$10,000. This assumes a van with the factory-installed options listed at the beginning of this Section.

Some firms prefer to purchase their vans with payment in full, demonstrating substantial support for vanpooling by using funds that could have been invested in other ventures. The alternative is financing over time with more favourable interest rates usually available from banks than from the dealer. The interest, at 10% to 12% per year, represents \$1,600 or more over 3 years that may or may not be calculated into your van fares.

Van dealers are listed in the Yellow Pages under Truck Dealers.

#### **4.4 Leasing**

By nature of its size and type of business, a leasing company or lessor can offer attractive acquisition, maintenance and disposal options otherwise unobtainable. However, it may also be selling some services you might be able to provide yourself.

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Leasing allows you to operate a van while paying a fixed amount per month that includes most of the anticipated costs of acquisition, financing, possible insurance, and maintenance. As the monthly rate includes all costs (except gasoline) there are no unexpected repair expenses. This predictability and convenience is an advantage to programs that require the accurate budgeting such an arrangement allows.

Your accounting and legal staff can determine what fiscal advantages leasing might offer. As a single line-item expense, it may simplify tax matters.

Van lessors are listed in the Yellow Pages under Truck Renting and Leasing.

### **Leasing Rates**

The monthly leasing charge is based on the number of months of the lease and an estimate of the number of miles that will be driven during the lease. Monthly rates will be better on a 4-year than a 3-year lease. Similarly, the cost per kilometre will be better for a 50 km than a 25 km work trip.

### **Open-End and Closed-End Leases**

The ownership provision at the end of the lease period is the basic determinant of the type of lease. In an open-end lease you agree to purchase the vehicle for a stipulated price at the end of the lease. With the closed-end lease the leasing company retains ownership of the vehicle at the end of the lease.

With the open-end lease (also called the finance lease) you pay a monthly leasing cost based on the length of the lease and the anticipated distance to be travelled by the vehicle. There is no additional charge for distance travelled in excess of this estimate. At the end of the lease you (or, perhaps the driver) pay a stipulated amount and the vehicle then becomes your (the driver's) property.

If you do not wish to purchase the van at the end of the lease, the leasing company will probably agree to sell the vehicle for a fee. If the leasing company sells the vehicle for you, you receive the profit or pay the loss on the sale. The leasing company takes no risk as to the value of the vehicle at the end of the lease, so there are no charges for excess distance travelled. The monthly leasing charge may be higher or lower than for a closed-end lease depending on the stipulated purchase price. The projected profit or loss incurred when disposing of the van should be considered when setting the fares.

With the closed-end lease, you pay a fixed monthly leasing fee plus a distance charge for travel above a limit specified in the lease. You are also obliged to properly maintain the vehicle and to return it at the end of the lease in the same condition as received, normal wear and tear excepted. At the termination of the lease you may have the option of purchasing the vehicle for a stipulated price. If this option is not exercised the vehicle is returned to the leasing company. Any necessary repairs, except for normal wear and tear, will be charged to you.

Other areas dealt with in leases are early termination, insurance and maintenance. The policy on early termination varies from company to company. You must guarantee the book value of the vehicle (the depreciated value based on a straight-line depreciation). There may be other terms such as a 3-month penalty or a penalty



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of 12 months less the expired portion of the lease. Most leasing companies require insurance coverage of \$1 million for third-party liability and may require collision and comprehensive coverage (particularly with closed-end leases). Also, with closed-end leases you must maintain the vehicle according to the Owner's Manual.

There are many variations on the basic ideas of open and closed leases and you will want to discuss these with various leasing companies, particularly if you intend to lease several vans.

#### **4.5 Maintenance**

One of the benefits frequently mentioned by vanpool riders is their satisfaction in knowing that their van will be at their door without fail every morning. This punctuality directly reflects the driver's careful attention towards maintaining the van according to the scheduled program.

Many leasing companies recognize that full maintenance leases are too expensive a service for them to provide and they no longer promote them. One company provides a monitoring and forecasting service which ensures that vans are properly maintained. Others offer budgeted maintenance plans where a fixed fee is paid for all maintenance and repairs each month, and the difference from the expenses actually incurred is either paid or refunded upon termination of the lease.

If your firm has a large vehicle fleet with its own shop, you could use it for van service. Time and parts used for vanpools can be charged directly to the vanpool account.

##### **Maintenance Contracts**

Whether your vans are leased or purchased you may be able to arrange for maintenance on a contract basis from a dealer, auto service centre, or a reliable nearby service station. These companies offer comprehensive service for a fixed price, thereby eliminating approval and payment for each service job. In addition to regularly scheduled tune-ups and alignments, the contract may also include pick-up and delivery of the vans from your lot, replacement of specified or any worn out or defective parts, tires for the life of the van, and use of a replacement van during longer periods.

# Calculating & Collecting Fares

The financing of a vanpool program is discussed under the following headings:

- Fixed and operating costs
- Calculating fares and special fare structure
- Bookkeeping and fare collection

## 5.1 Fixed and Operating Costs

Estimating your costs accurately allows you to assign appropriate fares for the pilot program.

### Fixed Costs

Your monthly fixed costs include the cost of the vehicle, plus annual expenses such as vehicle registration and insurance.

Two examples of fixed costs are provided in the sample forms given. One example relates to a purchased van for which the company absorbs the interest cost; the other relates to a leased van. The difference in cost between the two is an indication of the impact that company support can have on a program.

### Operating Costs

To estimate your vanpool operating costs on a per kilometre basis, use the following guidelines:

- 1/ *Gasoline:* Fully loaded vans, which are rated for gross weights of roughly 3,400 kg average 19 km/gal, and with gasoline at \$0.94 per gallon, the cost per km would be \$0.049. This figure could drop to as low as \$0.04 per km depending on the type of driving on a particular van route, the fluctuating price of gasoline, and arrangements for obtaining it at a discount. On the sample trip used in the fare calculations this would be a monthly saving of about \$3.00 per passenger.
- 2/ *Tires:* The simplest method of allowing for tire costs is to include a suitable cost per km in the van operating costs. This will allow for replacement tires to be purchased for vans which travel over 70,000 km (the estimated life of steel belted radial tires). If new tires are not purchased the tire allowance would off-set any resulting decrease in the salvage value of the van. If you have a maintenance contract that includes tire replacement you do not include it as an operating cost. A rate of \$0.005/km was used for tire costs in the example calculations. If snow tires are purchased their full cost should be added as a fixed cost in Part A.
- 3/ *Frequent Servicing:* This includes oil and filter changes, lubrication and cleaning. Most vans receive this service frequently (every 5,000 to 7,000 km) to ensure reliable performance. Fares should include a wash (about \$4.00 for vans) approximately every 2 weeks. You can calculate these costs on your own by dividing the cost of service visits by the distance interval between them (e.g. \$40/6,000 km). Most companies with vanpool program experience estimate \$0.005 to \$0.01/km for these services.

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- 4/ *Other Maintenance:* Tune-ups, wheel alignment, fluid checks at regular intervals, and any necessary repairs should cost approximately \$0.016/km over the life of the van. Exact costs can be calculated in the same way as those for frequent service.

## 5.2 Cost Calculations

Two completed forms are included in this Section and sample forms are given in Section 8. One form can be used to calculate the cost and fares of a purchased van; the other can be used to calculate the cost and fares of a leased van.

Estimating operating costs and fares for your vans simply requires inserting the costs determined above into the appropriate form. After your vans have been in operation for 6 to 12 months you will have more accurate costs to use in these calculations.

Use Part A of the form to calculate the fixed cost for the van. In addition to depreciated value or leasing costs, other line-items may include vehicle registration, insurance, snow tires, and a maintenance contract. For a purchased van, you may decide to include the cost of financing. This cost of about \$50 to \$55 per month would be another line-item in Part A. For leased vans, the leasing costs usually include the bulk of your expenses. Depending on the components of your lease and administration of your program, you may add line-items to Part A such as those cited above.

Use Part B to calculate operating costs per kilometre for the van. If you have a maintenance contract which includes tires, gas is your only line-item per kilometre; otherwise, you would include tire costs for the van life, and cost of frequent servicing activities plus other maintenance items.

## 5.3 Fare Calculations

Part C of the forms shows how to compute your van fares, using the monthly fixed costs and operating costs. By varying the distances travelled you can use Part C to develop a list of fares for different trip distances, which could then be used in your publicity.

## 5.4 Special Fare Structures

In most vanpool programs, the riders understand that they are paying in advance for a reserved seat and that no refunds will be made for days when he does not use the van. However, riders are usually allowed to arrange for replacement riders to take their place on an occasional basis. The neighbourhood employee list for each driver or program administrator is useful in this regard. Remind riders that van fares are usually low enough that poolers can occasionally miss the van and still save a considerable amount of money compared to driving alone.

Some companies have taken a more flexible approach to fares in order to accommodate individuals who cannot ride 5 days a week. For example, vanpool drivers can keep a checklist in their vans which allows each passenger to indicate days to be missed during the following week. This serves as a reminder to schedule replacement riders and apportion payments properly. A mini sample Vanpool Daily Signup list is given in this Section and a sample is included in Section 8.

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Vanpool riders who frequently miss one or more days each week can be accommodated by a fare system that charges a portion of the monthly fare by subscription and the remainder as a daily fare. Part-time or casual riders can be seated for the total daily fare plus a small surcharge.

If some riders travel a longer distance than others, the fares can be calculated in 2 parts; a fixed portion related to the fixed costs and a variable portion related to the operating costs.

Each vanpool should determine its own fare structure. The total fares should cover the total costs.

Instead of receiving bonus fares, vanpool drivers can return them as a dividend to all riders. This provides all riders with an incentive to keep the van full. This fund also can be used as a mechanism for reimbursing those who missed rides.

One company offers to support its vanpool for a 60-day grace period if ridership drops below the break-even level. This gives the driver a chance to recruit new riders while temporarily operating at a deficit.

Some firms lower van fares by using their vans for business purposes during the workday. In return, the department using the van pays the van account a distance charge to offset the van's operating costs, and to help defray fixed costs. Some vans display the company logo and receive a fee from their advertising department. Include an estimate of such revenue in computing your fares, and determine whether or not such use affects the insurance classification of the vans.

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## 5.5 Bookkeeping

Each driver is responsible for managing the financial affairs of his or her vanpool. The duties primarily involve keeping a monthly record of all vanpool income and expenditures on simple forms you can provide.

The Vanpool Daily Log and a Vanpool Revenue and Expense Report are shown in this Section. They record the amount of commuting, personal, and business travel, the preceding month's expenses, and those advanced by the driver, a list of passengers and their fares for the upcoming month, and totals showing how much money is due the firm and how much is due the driver. (Refer to Section 8 for samples.)

To periodically check the driver's reports some companies merely subtract the regular monthly kilometres commuting route from the total kilometres driven as shown on the odometer, and compare this to the personal or business travel which the driver has indicated.

## 5.6 Fare Collection

Each rider must be billed for the upcoming month's fare and receive whatever compensation is due. This is usually handled through either an invoice and payment chain or payroll deduction. In most vanpool programs, the driver issues each rider a Monthly Invoice, such as the one shown in Section 8. Each rider then either mails a cheque directly to the company cashier or pays the driver, who deposits the cheques in the proper account. Payments for operating supplies and services and driver reimbursements are drawn on this account. An account for each van can



be created in order to keep a close watch on individual vans, rather than maintaining program-wide finances.

Many companies use payroll deduction. As with any other tax or benefit item, each rider's monthly fare is deducted from the pay cheque and placed in the van-pool's account.

In organizations where drivers are eligible, they can receive incentive payments through the same mechanism, according to the amounts shown on the van's monthly expense record. To minimize the month-to-month changes in the payroll deductions, poolers can arrange payments for substitute riders and back-up drivers among themselves. The sample Payroll Deduction form shown in Section 8 can also be used to add or delete names from the deduction system.

The calculations below are intended to help ensure that you have a straightforward system for determining your costs and options. The calculations are based on a van which

- costs \$10,000;
- is amortized or leased over a 3-yr. period (interest charges are not included);
- operates over an 80 km round trip;
- operates with 10 paying passengers.

If the van is amortized over a longer period your fixed costs would be reduced substantially.

#### Calculating Costs and Fares for a Purchased Van

##### Part A Fixed Costs

###### Determine the Depreciated Value of the Van

Cost of the van	\$ 10,000	
less salvage value (after 3 years)	\$ 2,700	
	\$	
Equals Depreciable Value	\$ 7,300	\$203 /month

###### Add Other Annual Expenses

Vehicle registration	\$ 91	
Insurance	\$ 700	
INTEREST CHARGES	\$ NIL	
	\$	
	\$	
	\$	
Equals other fixed expenses	\$ 791	\$ 41 /month

###### Add Maintenance Contract (if applicable)

	\$ /month	
	\$ /month	
Equals Total Monthly Fixed Expenses		\$244 /month

##### Part B Operating Costs

###### Gasoline Costs

Gasoline based on \$0.14/gal. and consumption of 19 km/gal.	\$0.049/km
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###### Add Other Operating Expenses (if not included in maintenance contract)

Tires	\$0.006/km
Oil change, filter, lubrication	\$0.004/km
Maintenance	\$0.014/km
	\$0 /km
	\$0 /km
	\$0 /km
Equals Total Operating Cost per Kilometre	\$0.076/km

##### Part C Passenger Fares

Start with daily round trip distance of the van	80 km
Multiply this by the average number of weekdays in a month	x20 = 1600 km
Multiply this by the operating cost per kilometre from Part B	x \$0.076 = \$122 /month
Add the monthly fixed cost from Part A	+ \$ 122 = \$244 /month
Divide this cost by the number of paying passengers	10 = \$24.4 /month/passenger

#### Calculating Costs and Fares for a Leased Van

##### Part A Fixed Costs

###### Leasing Cost of the Van

3 year lease	\$ 300 /month
	\$ /month

###### Add Other Annual Expenses

Vehicle registration (if not in lease)	\$ 91
Insurance (if not in lease)	\$ 400
	\$
	\$
	\$
Equals other fixed expenses	\$ 491

###### Add Maintenance Contract (if applicable)

CITY GAS SERVICES	\$ 43 /month
	\$ /month
Equals Total Monthly Fixed Expenses	\$ 534 /month

##### Part B Operating Costs

###### Gasoline Costs

Gasoline based on \$0.14/gal. and consumption of 19 km/gal.	\$0.049/km
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###### Add Other Operating Expenses (if not included in maintenance contract)

Tires	\$0 /km
Oil change, filter, lubrication	\$0 /km
Maintenance	\$0 /km
	\$0 /km
	\$0 /km
Equals Total Operating Cost per Kilometre	\$0.049/km

##### Part C Passenger Fares

Start with daily round trip distance of the van	80 km
Multiply this by the average number of weekdays in a month	x20 = 1600 km
Multiply this by the operating cost per kilometre from Part B	x \$0.049 = \$78 /month
Add the monthly fixed cost from Part A	+ \$ 534 = \$612 /month
Divide this cost by the number of paying passengers	10 = \$61.2 /month/passenger

# VANPOOL DAILY SIGNUP

OCTOBER 1, 1978 OCTOBER 31, 1978 03 NEWMARKET  
(Date) From To Vanpool Number Vanpool Route  
JOHN SIMON  
Driver/Coordinator

Write s.m. and/or p.m. in box under your name to indicate when you will be unable to ride or contact driver in advance. Casual riders should check when they will ride.

Date	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
	1. GABRIEL	2. DESLAURIERS	3. SMITH	4. WONG	5. DUTTON	6. PORTUONDO	7. SMUTYLO	8. BROWN	9. SCOFFIELD	10. JACOBSON	11. LEE	12. GIBBS	13. GIBBS	14. GIBBS																	
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# VANPOOL DAILY LOG

OCTOBER 1, 1978 OCTOBER 31, 1978 03 NEWMARKET  
(Date) From To Vanpool Number Vanpool Route  
JOHN SIMON  
Driver/Coordinator

5080  
Beginning odometer reading

Date	Odometer Reading at End of Day	Distances Travelled (km)				Person and Department for Personal and/or Business Travel
		Total	Commute	Personal	Business	
1	5085	5				SIMON
2	5165	80	80			
3	5265	100	80			GRAHAM, JCB #2896
4	5366	101	80	21		SIMON
5	5446	80	80			
6	5526	80	80			
7	5576	70		70		SIMON
8	5576	0				
9	5666	70		70		SIMON
10	5746	80	80			
11	5826	80	80			
12	5906	80	80			
13	5986	80	80			
14	5986	0				
15	5991	5		5		SIMON
16	6071	80	80			
17	6166	95	80			GRAHAM, JCB #2896
18	6246	80	80			
19	6326	80	80			
20	6406	80	80			
21	6456	50		50		SIMON
22	6461	5		5		SIMON
23	6541	80	80			
24	6626	85	80	5		SIMON
25	6706	80	80			
26	6841	135	80			55 DESLAURIERS, JCB #5966
27	6921	80	80			
28	7037	116		116		SIMON
29	7044	5		5		SIMON
30	7124	80	80			
31	7204	80	80			
Total for Period		2124	1680	354	90	

# Vanpool Revenue and Expense Report

JOHN SIMON 03 NEWMARKET 80 km  
Driver/Coordinator Vanpool Number Vanpool Route Daily Distance  
OCTOBER 1, 1978 OCTOBER 31, 1978 7191 WEST TOWER  
(Date) From To Work Phone Work Location

Passenger Name	Employee Number	Amount
1. DOUG GRAHAM #	5093	\$ 37.00
2. BILL DESLAURIERS #	5103	37.00
3. JAMES SMITH	5070	37.00
4. TERRY WONG	6740	37.00
5. JOHN DUTTON	5157	37.00
6. JOE PORTUONDO	6071	37.00
7. DITTY SMUTYLO	5605	37.00
8. BRIAN BROWN	6095	37.00
9. PAT J. SCOFFIELD	6975	37.00
10. JIM SLOCUM	6917	37.00
11. RICHARD LEE	5153	37.00
B Back-up Drivers		
Total passenger revenue		\$ 467.00
Less minimum monthly charge (fare) due company (10 fares)		\$ 370.00
Equals incentive fares over minimum due Driver/Coordinator		\$ 97.00

Kilometres	Expenses				
Date	Odometer	Expense (List item and/or gallons of gas and attach receipt)	Amount Paid & Due Driver	All Expenses Incl. amt. paid by driver or billed company)	
Beginning	1012	5161	21 GALLONS @ \$0.94	\$ 19.74	\$19.74
	1016	5522	19 GALLONS @ \$0.94	\$ 17.86	\$17.86
Ending	1012	5702	20 GALLONS @ \$0.94	\$ 18.80	\$18.80
	1016	6322	MAINTENANCE (6000 km)		\$70.00
	1019	6322	22 GALLONS @ \$0.94	\$ 20.68	\$20.68
	10125	6702	20 GALLONS @ \$0.94	\$ 18.80	\$18.80
Total	10131	7120	22 GALLONS @ \$0.94	\$ 20.68	\$20.68
		Total operating expense		\$16.56	\$16.56
		Less personal use of 559 km @ \$0.076		\$ 42.70	\$ 42.70
		Commute			\$ 13.60
		Plus driver incentive fares		\$ 37.00	
		Total due Driver/Coordinator or due company (attach cheque)		\$126.66	
		Net vanpool operating expense			\$126.66
Business					
		Driver/Coordinator signature			
		Date Submitted			
		78/11/11			
		Date Approved			
		78/11/17			



# 6

## Organizing the Vanpool

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This Section deals with implementing the vanpool after employee interest has been determined and the drivers selected. Subject areas include:

- Matching or assembling the pool.
- The pool start-up meeting.

### 6.1 Matching

Once the returns from the interest survey have been received, the administrator will analyse them in preparation for matching, route selection and driver appointments.

The most common process is for the administrator to identify those individuals interested in driving, and select suitable candidates as explained in Section 3. A pool of 10 or 11 participants is then formed for each driver. The pool is either drawn from the driver's immediate vicinity or from a route between the driver's residence and the work place. This matching is normally done by hand; however, if carpooling is being established simultaneously with vanpooling, the same data base could be used and a computerized matching program can be employed. This matching program is available at the Ministry.

### 6.2 The Pool Start-Up Meeting

A week before the van is set to arrive, a pool start-up meeting should be arranged for the van drivers and their passengers. This is the first opportunity for all of the individuals to meet as a pool and serves as a forum for discussing details of the vanpool program (such as the fare, the route, and various other policies).

The vanpool program administrator should attend this meeting in order to answer any questions regarding the company's involvement in the program and to gauge the program's progress. The administrator should also come prepared with a proposed route and a possible fare schedule. The pool members may have suggestions on route improvements and should establish among themselves how the fares will be calculated. The administrator's concern is that the total fares equal the total costs. It is useful to distribute a subscription agreement to potential vanpool riders before the meeting. A sample Vanpool Subscription Agreement is included in Section 8. This document clarifies the company and rider's obligations to the vanpool. Your legal staff should review this sample and tailor it to your needs.

Having reviewed this agreement, the vanpoolers will be prepared to discuss and develop policies on such points as:

- Responsibilities of the driver and back-up drivers.
- Fare collection procedures.
- Personal arrangements for substitute riders (the fare pays for a reserved seat).
- Responsibilities of the riders to notify the driver, in advance when possible, of vacations, illness, overtime, etc.
- Establishment of a chain of communication for notifying the driver of absences. Usually a rider calls the person picked up one or two stops ahead of himself.
- The van's route. At this time, the riders may suggest improvements in pick-up order or street routing.

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- Arrival time. Scheduling the van to arrive at work 5-10 min. early will allow time for unforeseen delays.
  - Waiting time per stop. Two minutes is usually the limit.
  - Smoking. Some companies have instituted “no smoking” rules on their vans and have found them much appreciated.
  - Policies on use of the radio, heater, etc.
  - Agreement on a seating arrangement which will make entering and exiting the van safe and orderly. Where 15-seat van bodies are used, the seat attachments on the van floor must be capable of accommodating no more than 12 seats. Otherwise you will run into legal problems relating to the need for a Public Vehicle Licence as detailed in Section 7.
  - Reading lights, stereo music, a game table and ice chest are among the custom features your vanpoolers may wish to install to make their trip more pleasant.
  - In sparsely settled areas where pick-up times are long, you may want to allow for pick-ups at designated meeting points, such as park-and-ride lots along the way. Some vanpools pick up some passengers at their homes and others at roadside parking lots. Remember that riders lose interest if the time spent picking up and discharging passengers takes longer than the express portion of the trip.
  - If your firm has several branch facilities, you could designate them as vanpool park-and-ride stops. Each could be considered a pick-up point for employees living near it but working at another facility where their van is based.

After the pick-up points are established, the driver should drive the route without passengers to determine the exact travel distance and pick-up times. With assistance from the program administrator, the driver can then establish the van’s fares according to the pool policy. The sample Vanpool Rider List given in this Section provides a record of each passenger, their addresses, telephone numbers and pick-up times. The poolers can use this list to define a chain of communication for informing the driver of an absenteeism.

### 6.3 General Considerations

The following outlines some options and policies that have been developed by operational vanpools, and which might apply to your situation.

- In order to maintain enthusiasm for the program, some firms order the van as soon as likely service areas are chosen, so it can be put into service quickly, rather than well after pool formation.
- Most vanpool programs allow the driver to use the van during non-working hours and on weekends. At his discretion, some companies allow vanpool riders, if properly licenced, to use the van for daytime personal use, such as lunchtime errands. Thus poolers need not feel stranded during the day.
- Some companies attract riders to their longer routes by offering plush individual reclining seats with extra leg room. Local trim shops can install extra insulation, carpeting, individual reading lights and 10 airline-type seats (with pockets for personal items) in van bodies designed to accommodate 15 seats.



- A simple way to provide added comfort, especially if your employees frequently have parcels or gear to carry to work, is to use larger vans.
- Even though a vanpool agreement outlines the policy guidelines of the company, each vanpool should be viewed as a community having its own rules and regulations. The rules are decided by a majority of the riders within the vanpool.

### VANPOOL RIDER LIST

Driver JOHN SIMON Vanpool Number 03 Vanpool Route NEWMARKET  
 Date OCTOBER 1, 1978 Parking Space Number 3 Daily Distance 80 km  
 Address 23 WEAVER ST., QUEENSVILLE Home Phone 892-4331 Work Phone 7191

Name	Address	Home Phone	Work Phone	Pick-up Time
1 DONALD GARRAH	67 OAKMONT QUEENSVILLE	892-6261	7251	7:10
2 BILL DESLAURIERS	82 ELLING SHARON	892-4247	7622	7:14
3 JAMES SMITH	7 WALLACE SHARON	892-8431	7436	7:16
4 TERRY WONG	31 FRANK NEWMARKET	890-3421	7644	7:22
5 LOAN DAYTON	241 WATER NEWMARKET	890-3112	7436	7:28
6 JEE PORTLAND	333 TEEPE NEWMARKET	890-2652	7141	7:25
7 BITTY SMITH	3434 GUARD NEWMARKET	890-8448	7199	7:27
8 BRIAN BROWN	10 QUEEN NEWMARKET	890-4412	7243	7:27
9 PAT J. SHAPIRO	168 RIVER NEWMARKET	890-8651	7272	7:29
10 JIM TOLMAN	82 FARGETTE NEWMARKET	890-8761	7272	7:30
11 EDWARD LEE	SHOPPERS MALL NEWMARKET	896-5342	7422	7:35
12 FRANK AYLER	8 MOUNT OLIVE SHARON	892-3728	7222	7:35
13 PETER GOATS	180 WATER NEWMARKET	890-7266	7341	7:22
14 KEN PANG	SHOPPERS MALL NEWMARKET	896-2786	7450	7:35

#### CASUAL RIDERS

Back-up Drivers DONALD GARRAH BILL DESLAURIERS

Homebound departure time (or when all riders are aboard) 4:40 PM

# The Legal Situation

## 7.1 Overview

The laws regarding ridesharing in Ontario have recently been altered to eliminate some legal barriers and to ensure protection for riders. These changes are outlined in the appropriate parts of this Section which deal with:

- Motor carrier regulations.
- Insurance and Workmen's Compensation.
- Vehicle registration and safety equipment.
- Driver Licensing.
- Taxes.

As used here, the term vanpool refers to 8 to 12-seat vehicles purchased or leased by a participating organization, for travel between participating employees' homes or pick-up locations and place of employment. Driving is performed by one or more of the participating employees. So defined, a vanpool is identical to a commuter carpool, save these exceptions: a larger vehicle is used; the participating organization may assist in purchasing or leasing the vehicle; the organization may carry out certain other organizational and administrative activities which facilitate the operation of the program. Vanpool programs which vary from the prototype described above can be readily imagined. If you are considering a program which differs in any significant respect from the prototype, you should decide to what extent the legal and institutional issues discussed in this Section are applicable and address any new issues which arise out of your particular variation.

## 7.2 Motor Carrier Regulations

Vanpools are generally exempt from motor carrier regulations which are contained in Ontario's Public Vehicle Act and apply to the carriage of passengers from one municipality to another.

The definition of public vehicles has been amended to exclude vanpools, and consequently vans with 12 or fewer seats used to transport commuters, are not subject to the regulation of routes, fares, service frequency, and insurance applicable to common carriers (see Appendix 1). Vans with more than 12 seats are subject to the common carrier regulations.

The carriage of passengers within a municipality is controlled by the municipality in question under authority of Ontario's Municipal Act. The Ministry would advise companies to obtain authorization from the municipality if a vanpool is to be operated strictly within that municipality's boundaries. Authorization for some vanpool operations has already been given by some municipalities. Generally, vanpools either cross a municipality boundary or the routes are selected so that at least one end of the trip is not well served by public transit. Consequently, the vanpool does not compete with the local transit authority.

The Dominion Parliament has passed the Motor Vehicle Transport Act to licence the carriage of passengers for compensation (i.e. paying passengers) across provincial borders. This Act empowers the provincial licencing boards to issue Dominion licences on the same basis as if issuing a local licence, which means that Ontario based vanpools (the base province presumably being determined by the owner's address) should be able to operate across provincial boundaries.

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### 7.3 Insurance

Determining the most appropriate type and source of insurance coverage for your vanpools is a decision to be made in consultation with your firm's own insurance and legal departments. No single insurance coverage or rate recommendation can be made for all programs.

If your firm has a single fleet policy for company cars or a type of umbrella or catastrophe coverage, the best solution may be to include your vanpools under the same policy. The additional premium charged, if any, will depend upon such factors as the deductible desired, possible other uses of the vans both during business and outside business hours, and the amount of coverage desired considering that the vans will have up to 12 wage earners on board.

Some companies will be less willing to write a policy than others because of the very limited experience in insuring vanpools in Ontario. Vanpool insurance should be available for about \$400/yr. This covers \$1 million 3rd-party liability, standard accident benefits (no fault), collision (\$250 deductible), and comprehensive (\$50 deductible). You may want to increase some of this coverage (for example, the accident benefits which cover disability and death benefits), or you may find that all your employees are already covered under a company policy. You will also want to establish a policy stating under what conditions the driver or company is responsible for paying the deductible portion of a collision. In several programs the driver is responsible for the total deductible during personal driving and for the first \$50 during pool driving if the driver is at fault.

There are 2 endorsements available that your insurance experts should investigate. These are SEF 6(a) and 20 and deal with carrying passengers for compensation and loss of use of the van, respectively.

Some organizations with large fleets self-insure for collision and comprehensive. This can be accomplished by setting aside an appropriate amount of money each year from the fares paid.

Experience in the United States indicates that vanpools had a collision rate of 3.76 per million vehicle miles compared to 6.36 for passenger cars including taxis, 19.1 for school buses, 26.3 for suburban buses, and 57.3 for urban buses.

Organizations which lease their vans may find that the leasing company will insure them although most prefer not to. A leasing company which insures many vehicles may have a favourable rate and would be able to pass on the saving. Your insurance expert should evaluate any leasing company insurance to ensure that you have the coverage required.

Any vanpools organized by an unincorporated association should obtain enough third-party liability coverage to cover any contingency. If this appears difficult the association could be incorporated and thereby its liability becomes limited.

### 7.4 Workmen's Compensation

In general, employees are not covered by Workmen's Compensation when commuting to and from work by van, although there are exceptions to this rule where the commuting trip is under the control of the employer. Workmen's Compensation will not apply to vanpools as defined previously in this Section.

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The Workmen's Compensation Act in Ontario provides benefits for employees injured during the course of their employment. The Act limits the employer's maximum liability for work-related injuries but gives employees financial relief for injury-related expenses and income maintenance.

The Workmen's Compensation Board will provide advance rulings as to whether Workmen's Compensation insurance would or would not apply under specific vanpooling options. In general, it will not apply and you will therefore require the standard accident benefits as part of your insurance coverage. If the Board rules that Workmen's Compensation would apply, you would not require the standard accident benefits as provided in an insurance policy for the trip to and from work.

However, you would require this coverage for incidental use by the driver. For the minor cost saving (under \$20 per year), you are advised to carry the standard accident benefits.

**7.5 Vehicle Safety**

There are no special safety regulations which apply to vanpools. Vans are subject to the same rules and regulations as personal automobiles. Of course assurance that the vehicle will be maintained as safe and roadworthy should be part of the operating agreement with the driver.

Seat belts are required on all seats and are supplied as standard equipment on all 12-passenger vans.

**7.6 Vehicle Registration**

A passenger van with 10 or more seats is registered as a commercial motor vehicle and classified as a bus (body type). Vans are issued bus licence plates. A licence plate bureau (listed in the white pages under Government of Ontario, Ministry of Transportation and Communications, Vehicle Agents) will be able to provide you with current regulations and annual licence fees.

The annual licence fee varies with gross vehicle weight (GVW). For vehicles classified as buses the gross vehicle weight equals the weight of the empty vehicle plus 60 kg per passenger seat. The GVW of most 12 passenger vans falls within the range of 2401 kg to 3000 kg for which the licence fee is \$69.00 in 1979. A van classified as a bus is not restricted from using the left lane on some freeways and does not have to stop at Government inspection stations.

Finally, consult your insurance agent regarding this type of registration to see if there are insurance implications.

**7.7 Driver Licencing**

Under the new classified driver licencing program, a Class F licence will be required for the drivers of vans with seats for 11 to 24 persons. The licencing requirements include a written and driving test, an eye test, and a medical examination.

**7.8 Taxes**

If the vans are to be used solely for commuting purposes you will be able to obtain a refund of the federal excise tax, which amounts to about 10% of the purchase price. Also, provided that the van has more than 10 seats, it is not considered

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a taxable benefit (i.e., an employee who drives to work in a company car with 10 or fewer seats must normally add \$50 per month to his/her income).

If you choose a fare structure that provides a financial incentive to the driver to keep the van full, the driver is required to report this incidental income on his or her personal tax return. Van riders may not claim their fares or any other commuting costs as deductions.

As operator of the vanpool, the employer should follow appropriate Revenue Canada regulations to properly account for operating expenses, van depreciation, and revenues.

## **7.9 Conclusion**

The foregoing discussion provides an overview of the principal legal and institutional issues posed by most vanpool programs. Its purpose is to guide you in your decisions and to inform you of requirements that must be met, and the options available. Be sure to consult those persons responsible for your legal, insurance and vehicle acquisition and operation activities. They may already have addressed and solved some of the matters raised by a vanpool program.

Where legislation such as the Public Vehicles Act or the Negligence Act has been amended, the intent of the legislation has been to encourage ridesharing and to eliminate any legal barriers to it, and, as a result, encourage inexpensive, safe, and energy-efficient travel to and from work.

## Sample Forms

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### List of Forms

Company Endorsement Letter  
Vanpooling (Information Flyer)  
The High Cost of Driving  
Van Driver Application  
Vanpool Driver Cooperative Agreement  
Calculating Costs and Fares for a Purchased Van  
Calculating Costs and Fares for a Leased Van  
Vanpool Daily Signup  
Vanpool Daily Log  
Vanpool Revenue and Expense Report  
Vanpool Invoice  
Vanpool Payroll Deduction Authorization  
Vanpool Subscription Agreement  
Vanpool Rider List  
Van Maintenance Schedules\*  
    A Automatic Service Maintenance Check List  
    B 6000 km Preventative Maintenance Schedule  
    C Preventative Maintenance Schedule by Kilometre Intervals (12 000-54 000 km)  
    D Preventative Maintenance Schedule by Kilometre Intervals (60 000-108 000 km)  
Maintenance Record \*

\*Courtesy of 3M Canada.



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## Company Endorsement Letter

Memorandum:

**Subject: Introduction to Commuter Vanpooling Program**

In an effort to lower commuting costs for our employees, to reduce highway congestion and to make more efficient use of fuel, (company name) is starting a commuter vanpool program.

For the initial pilot project, (company name) plans to (purchase or lease) 12-passenger deluxe vans and make them available to our employees living in selected areas. Passengers will pay monthly fares calculated to cover the cost of the vans and their operations. The selection of areas for the vanpool routes will be based on the amount of interest shown in a particular area.

Some of the advantages of riding in a van include lower commuting costs, reduced wear and tear on your own auto and a more pleasant trip to and from work with time to socialize, read or just relax.

Exact vanpool fares have not been set. They will depend on the cost of the vans, distance you travel and the number of people in the van. The enclosed flyer outlines the approximate monthly costs that you can expect.

If you are interested in participating, either as a van rider or a driver, please return the tear-off portion of the flyer to the Vanpool Administrator. You may wish to attend one of the informational meetings at which time more information will be supplied.

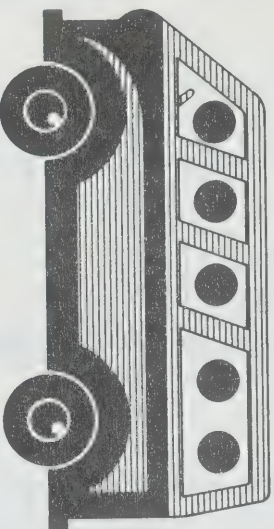
If you are interested in becoming a vanpool driver there are some advantages as well as some responsibilities. Van drivers will have a free trip to work and personal use of the van at minimal cost. Please indicate your interest in driving on the enclosed questionnaire.

We expect the vanpools to start operating in (month and year) and hope to receive an enthusiastic response to this questionnaire. If you have any questions, please contact (company name) Vanpool Administrator, (him/her) at (phone number).

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President

# VANPOOLING VANPOOLING



## What is it ?

A group of employees commuting together in the comfort of a luxury passenger van. These employees pay a low monthly fare which covers operating and capital costs. The van is owned or leased by the employer. The driver is a fellow employee, who rides free.

More than 40,000 people across North America are enjoying this new type of first-class travel directly from home to work. Each day, in the company of a few friends and neighbours, they obtain door-to-door service. They escape the headaches of driving in heavy traffic or bad weather. Best of all, they save hundreds of dollars per year!

## How Will It Work ?

Our company will obtain a few vans and assign each one to a group of 10 to 12 employees who live in the same neighbourhood or along a common route. One person in the vanpool group will be chosen to drive and maintain the van. Other members of the vanpool will pay a low monthly fare, which is less than the cost if one drives alone.

## What is in It for You ?

Think of the advantages. People join and stay with vanpooling because of:

### Comfort and Convenience

- convenience of door-to-door service
- release from the stress and tensions of driving
- comfort of a luxury ride (carpeted, air conditioned)
- reliability of the service
- freedom to read, work, sleep or just relax and enjoy the company of fellow vanpoolers

### Savings

- significant savings over the cost of operating their own car
- reduced wear on their car
- can eliminate the need for a second car
- reduced insurance rate — car used for casual use only\*
- energy savings

## Who Will Drive ?

Conscientious drivers make vanpooling work. Each driver will be a fellow employee selected for his or her dependability and safe driving record. In short, someone who can be relied upon. Drivers (and designated back-up drivers) are responsible for being punctual and for keeping the vans clean and well maintained. In exchange drivers

- commute for free
- have use of the van at night and on weekends for just the cost of gas and oil
- retain the fare of the 11th passenger

## What We Will be Doing

We are starting small, with just a few vans. Informational meetings have been scheduled so that you can learn more about vanpooling in general and our program specifically. One of the first steps will be the recruiting of vanpool drivers — they are the key to the success of the program. We also expect to have a demonstration van on display. You are cordially invited to come and 'kick the tires'.

So, if you are interested, fill out and return the attached form *Today*.

Informational meetings are scheduled for

Time: \_\_\_\_\_ Time: \_\_\_\_\_  
Date: \_\_\_\_\_ Date: \_\_\_\_\_

Location: \_\_\_\_\_



# Van Fares

A single monthly fare, paid in advance, covers all costs associated with the operation of the vanpool. The following table compares typical vanpool fares with the cost of operating a private car:

DAILY ROUND TRIP	TYPICAL MONTHLY VANPOOL FARE*	COST OF DRIVING ALONE**	MONTHLY SAVING
40 km		\$ 43	
80 km		\$ 86	
120 km		\$129	
160 km		\$172	

\*Note: Exact monthly fares will depend on the cost of the vehicles and the number in each pool.

\*\*Gas and maintenance cost only.

## \$ SAVINGS \$

Long distance commuters have the most to gain from vanpooling. For example, a commuter who makes an 80 km round trip will spend \$51/month for gasoline alone (assuming 30 km/gal. and 95¢/gal.). Add to that the cost of oil changes, maintenance and tire replacement and the cost goes up to \$86/month — not including the cost of the car, depreciation, insurance and annual registration. For one-way trips longer than 40 km, vanpooling is cheaper than a 2-person carpool and, when comfort and convenience are considered, vanpooling is an attractive alternative to large carpools as well.

# Second Car ?

The biggest savings for vanpoolers can come from selling or avoiding the purchase of a second car. No longer having to own and insure a second car, one can save more than \$1,000 per year. The following table shows the typical cost of simply owning a car:

## ANNUAL FIXED COST OF OWNING A CAR

	\$3000 CAR	\$6000 CAR
DEPRECIATION (23%)	\$ 690	\$1380
INTEREST (10%)	\$ 300	\$ 600
INSURANCE	\$ 200	\$ 300
REGISTRATION	\$ 45	\$ 60
TOTAL YEARLY COST	\$1235	\$2340

## Energy Savings

In addition to saving you money, vanpooling is also a significant energy conservation measure. By taking up to 10 cars off the road, each van saves about 5000 gallons of gasoline each year, perhaps more. Vans are very roomy inside but they are the same width and over a foot shorter than a full-sized station wagon.



NAME: .....  
HOME ADDRESS: .....  
CITY: .....  
POSTAL CODE: .....  
OFFICE PHONE: .....  
USUAL WORK HOURS: ..... to .....  
FLEXIBLE HOURS ☐ YES ☐ NO

### ● I AM INTERESTED IN VANPOOLING AS A:

(Check as many as you wish.)

- ☐ Van driver  
☐ Back-up driver  
☐ Passenger  
☐ I would like more information

### ● I PLAN TO ATTEND THE MEETING:

- ☐  
☐  
☐ Neither

### ● MY PRESENT METHOD OF TRAVEL TO

WORK IS:

- ☐ Drive alone  
☐ Drive or ride with others  
☐ Public transit  
☐ Other .....

### ● PLEASE DETACH AND RETURN TO:

Vanpool Administrator,

## The High Cost of Driving

### Operating Costs of a Car

<u>Vehicle Size</u>	<u>Operating Cost per km*</u>
Full-size	\$0.068
Mid-size	\$0.054
Compact	\$0.044

\* Includes gas and maintenance costs only.

### Vanpooling Compared to Driving Alone

Daily Round Trip	Weekly Operating Costs of a Car*			Typical Weekly Vanpooling Fare
	Compact	Mid-Size	Full-Size	
40 km	\$ 8.80	\$10.80	\$13.60	\$ 8.50
60 km	\$13.20	\$16.20	\$20.40	\$ 9.25
80 km	\$17.60	\$21.60	\$27.20	\$10.00
120 km	\$26.40	\$32.40	\$40.80	\$11.50
160 km	\$35.20	\$43.20	\$54.40	\$13.00

\* Includes gas and maintenance costs only.

The figures above illustrate how much it costs you to operate your car. It is apparent that there are significant savings to be gained by carpooling. For an 80 km round trip to work, vanpooling is a highly desirable option compared to driving alone or being in a 2-person carpool. When comfort and reliability of a vanpool are considered, vanpooling is an attractive alternative to large carpools as well.

Note that none of the above costs include the price of the car, licence and insurance costs. The biggest savings for vanpoolers can come from selling or avoiding the purchase of a second car. The following table shows the typical cost of simply owning a car:

### Annual Fixed Cost of Owning a Car

		<u>\$3000 Car</u>	<u>\$6000 Car</u>
Depreciation	(23%)	\$ 690	\$1380
Interest	(10%)	\$ 300	\$ 600
Insurance		\$ 200	\$ 300
Registration		\$ 45	\$ 60
Total Yearly Cost		\$1235	\$2340

# VAN DRIVER APPLICATION

\_\_\_\_\_ Date

\_\_\_\_\_ Driver

\_\_\_\_\_ Back-up Driver

Employee's Name

Years with company

Street Address

One way driving distance to work (km)

City

Postal Code

Work Schedule (reporting leaving/time, flexible hours)

Home Phone (include area code)

Work Location (building, room)

Work phone

1. What is your driving record? List any accidents or traffic violations during the past 3 years.

\_\_\_\_\_

\_\_\_\_\_
2. Do you have a Class F driver's license?  
\_\_\_\_\_ Yes \_\_\_\_\_ No  
If no, are you willing to obtain one?  
\_\_\_\_\_ Yes \_\_\_\_\_ No

3. How much travel and overtime does your job require?

\_\_\_\_\_

\_\_\_\_\_
4. How many days of work did you miss due to sickness last year?

\_\_\_\_\_

\_\_\_\_\_
5. Are you experienced in automobile repair?  
If so, to what extent?

\_\_\_\_\_

\_\_\_\_\_
6. What experience have you had in car/van/ buspooling?

\_\_\_\_\_

\_\_\_\_\_
7. What type of space can you provide for overnight van parking? (on or off street, garage, etc.)

\_\_\_\_\_

\_\_\_\_\_
8. What are your reasons for wanting to drive a van?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_
9. Would you be willing to be a back-up driver?  
Yes \_\_\_\_\_  
No \_\_\_\_\_
10. Would you be willing to be a passenger?  
Yes \_\_\_\_\_  
No \_\_\_\_\_
11. Supervisor's Name and Extension.

\_\_\_\_\_

Interviewer's Comments:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



# VANPOOL DRIVER COOPERATIVE AGREEMENT

This Agreement between the Driver whose signature appears below and (Company Name), hereinafter called the "Company" shall become effective on the date it is accepted by the Company, as evidenced by the signature of its authorized representative in the space provided below for this purpose.

For the purpose of forming and operating a vanpool with a minimum of ten (10) passengers, the Company agrees to furnish the use of a 12-passenger van, to assist in forming and maintaining the vanpool and to render such other reasonable assistance as may be required for the functioning of the vanpool. The Driver will be the primary driver of the van during the term of this Agreement.

The Driver agrees to be responsible for the following in connection with the operation of the van assigned to him or her:

1. Obtain and maintain a valid Class F driver's licence as required for operating the van.
2. Drive the van to and from his/her Company location and pick-up and deliver the other Company employees who pay to ride with him/her.
3. Keep the passenger pool for the van at or above the minimum of ten (10) paying passengers, but not to exceed a maximum of eleven such passengers.
4. Operate the van on a punctual schedule and according to a route approved by the Company.
5. Arrange for service and maintenance in accordance with the schedule prescribed in the vehicle's maintenance or instruction manual. Obtain fuel for the van and clean the vehicle inside and out as needed.
6. Train sufficient back-up drivers to ensure daily operation of the van.
7. Supply a secure place for "at home" parking of the van, preferably in a locked garage.
8. Arrange alternative transportation for passengers to and from the Company in the event the van is not operable due to mechanical failures or other similar emergencies.
9. Keep a record, satisfactory to the Company, of the operation expenses and income of the van.
10. Maintain a list of all passengers and either bill and collect from passengers by the first day of each month the approved fares and deposit the monies as specified by the Company, or submit a signed list for monthly payroll deductions as specified by the Company.

The Company agrees to reimburse the Driver for his or her out-of-pocket expenses in the operation of the van to and from work along the prescribed route. The Company also agrees that the Driver may ride free to and from work daily and retain any funds received from passengers in excess of the required minimum of ten (10) passengers and that he or she may use the vehicle during off hours at a rental rate of \_\_\_\_\_ cents per kilometre to be based on the actual costs incurred by the Company including, but not necessarily limited to gas, oil, and maintenance. The Company also agrees that the Driver may make the vehicle available for use by the Back-up driver, as an incentive to the Back-up driver, at the above rate and under the same terms as applicable to the Driver as set forth herein. The Back-up driver must maintain a Class F driver's licence for driving the van. The Company reserves the sole right to decide if the off-hour use of the vehicle is proper and does not become excessive as to extent or type of use.

It is agreed that the following regulations apply to the operation of the van:

1. Operation of the unit is permitted only by the Driver and Back-up drivers and by the spouse of either of them, if properly licenced. Only under emergency conditions will any other person be permitted to operate the

## **Vanpool Driver Cooperative Agreement continued**

vehicle. In this connection, in the absence of both the Driver and Back-up driver, any Company employee that is a member of the vanpool may operate the van for pick-up and delivery of passengers to and from work if he or she is authorized to do so by the Driver and is properly licenced.

2. The vehicle is to carry no passengers to and from the Company facilities, other than Company employees.
3. In the case of personal use, the carrying of passengers other than Company employees and members of the immediate household of either the Driver or the Back-up driver is not allowed without prior written permission of the Company.
4. The vehicle is not to be used for a trip beyond a one-hundred and sixty kilometre radius of the Driver's home without specific advance written approval from the Company.
5. The vehicle is not to be used to carry passengers or freight for hire, for ride sharing or any other purpose involving pay for transportation, other than the specific purpose of the Company vanpool program.
6. Repair work will be done only by those persons approved by the Company. All repair work, except in emergency situations, must have prior approval of the Company.
7. Accessories, including appearance items, or additional equipment will not be added or removed without prior approval of the Company.
8. Use of the vehicle to pull trailers is not allowed. No trailer hitches, temporary or permanent, are to be attached to the unit.
9. The vehicle is not to be used for any purpose requiring the removal of any seats.
10. The vehicle is to be driven only on hard surfaced public streets and highways and other normal access roads and driveways, and is not to be driven off normal roads, on beaches or in fields, on frozen lakes and rivers, or in any other manner that would expose the vehicle to unsafe conditions.
11. The vehicle is not to be driven over bridges posted to allow vehicles weighing only 4 tons or less.
12. The Driver is responsible for promptly reporting any accident involving bodily injury or property damage. Such reporting is to be in accordance with the procedures specified by the Company.
  - (a) Such reporting is also to include injury to a passenger in the van even though no other party is involved. (This would include such cases as a person falling inside the vehicle or injuring himself or herself while entering or alighting from the vehicle.)
  - (b) The Driver will be responsible for completing and filing all appropriate motor vehicle accident reports as well as the Company automobile accident reports.
  - (c) In the case of any and each accident during personal use of the van in which damage to the van is sustained, the Driver or Back-up Driver must pay the Company up to a maximum of (the Company collision deductible, if any) for repairs to cover the deductible amount under the van insurance.
13. Safe courteous driving habits, consistent with complete observance of all traffic regulations are of the utmost importance. Any legal charges resulting from a traffic violation while the van is in the care of the Driver or Back-up driver is the responsibility of the Driver and/or Back-up Driver. The Driver and/or Back-up Driver agrees to report to the Company any court summons resulting from a traffic violation, whether committed while driving the van or any other vehicle.

**Vanpool Driver Cooperative Agreement continued**

- 14. The Company, at its sole option, may dissolve any vanpool which is unable to maintain the minimum number of ten paying passengers and/or which is operating uneconomically.
- 15. The fares charged passengers will be periodically reviewed by the Company and increased or decreased consistent with the cost of operation.
- 16. The Driver is responsible for reporting the extra income received from any passengers over the minimum of ten on his or her Income Tax returns.

This Agreement may be terminated by either party on thirty (30) days written notice delivered to the other party in person, by telegram or by mail. In addition, it will terminate automatically on (a) termination of the Driver's employment with the Company, (b) loss by the Driver of the required driver's licence or (c) breach by the Driver of the terms of this Agreement.

Driver	Accepted: (Company Name)
_____	By _____
Date _____	Date _____

**Agreement to Serve as Back-up Driver**

I have received a copy of the above Vanpool Driver Cooperative Agreement, have read it and agree to be bound by its terms in serving as Back-up driver to the above Driver. I understand that breach of such terms will result in automatic termination of my right to serve as Back-up driver.

	Signature	Commencement Date	Termination Date
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____



Calculating Costs and Fares for A Purchased Van

Part A Fixed Costs

Determine the Depreciated Value of the Van

Cost of the van	\$	
less salvage value (after      years)	\$	
	\$	
	\$	
Equals Depreciable Value	\$	\$ /month

Add Other Annual Expenses

Vehicle registration	\$	
Insurance	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
Equals other fixed expenses	\$	\$ /month

Add Maintenance Contract (if applicable)

	\$	/month
	\$	/month
Equals Total Monthly Fixed Expenses	\$	/month

Part B Operating Costs

Gasoline Costs

Gasoline based on \$ /gal. and consumption of km/gal.	\$0.	/km
--	------	-----

Add Other Operating Expenses (if not included in maintenance contract)

Tires	\$0.	/km
Oil change, filter, lubrication	\$0.	/km
Maintenance	\$0.	/km
	\$0.	/km
	\$0.	/km
	\$0.	/km
Equals Total Operating Cost per Kilometre	\$0.	/km

Part C Passenger Fares

Start with daily round trip distance of the van		km
Multiply this by the average number of weekdays in a month	x =	km
Multiply this by the operating cost per kilometre from Part B	x \$0. = \$	/month
Add the monthly fixed cost from Part A	+ \$ = \$	/month
Divide this cost by the number of paying passengers	= \$	/month/passenger

Calculating Costs and Fares for a Leased Van

Part A Fixed Costs

Leasing Cost of the Van

year lease	\$ /month
	\$ /month

Add Other Annual Expenses

Vehicle registration (if not in lease)	\$	
Insurance (if not in lease)	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
Equals other fixed expenses	\$	\$ /month

Add Maintenance Contract (if applicable)

	\$ /month
	\$ /month

Equal Total Monthly Fixed Expenses

\$ /month
-----------

Part B Operating Costs

Gasoline Costs

Gasoline based on \$ /gal. and consumption of km/gal.	\$0. /km
--	----------

Add Other Operating Expenses (if not included in maintenance contract)

Tires	\$0. /km
Oil change, filter, lubrication	\$0. /km
Maintenance	\$0. /km
	\$0. /km
	\$0. /km
	\$0. /km
Equals Total Operating Cost per Kilometre	\$0. /km

Part C Passenger Fares

Start with daily round trip distance of the van		km
Multiply this by the average number of weekdays in a month	x =	km
Multiply this by the operating cost per kilometre from Part B	x \$0. = \$	/month
Add the monthly fixed cost from Part A	+ \$ = \$	/month
Divide this cost by the number of paying passengers	= \$	/month/passenger

## VANPOOL DAILY SIGNUP

To

### Vanpool Route

Driver/Coordinator

[illegible]



# VANPOOL DAILY LOG

(Date) From

To

Vanpool Number

### Vanpool Route

Beginning odometer reading

Driver/Coordinator

[illegible]

# Vanpool Revenue and Expense Report

[illegible]

## Revenue

Passenger Name	Employee Number	Amount
1 _____		\$ _____
2 _____		
3 _____		
4 _____		
5 _____		
6 _____		
7 _____		
8 _____		
9 _____		
10 _____		
11 _____		
_____		
_____		
_____		
_____		
_____		
Total passenger revenue		\$ _____
Less minimum monthly charge ( fares) due company		- \$ _____
Equals incentive fares over minimum due Driver/Coordinator		\$ _____

## Kilometres

## Expenses

	Date	Odometer	Expense (List item and/or gallons of gas and attach receipts)	Amount Paid & Due Driver	All Expenses (incl. amt. paid by driver or billed company)
Beginning					
Ending					
Total					
	Total operating expense			\$	\$
	Less personal use of      km x \$      /km			— \$	— \$
Commute	Less business use of      km x \$      /km				— \$
	Plus driver incentive fares			+ \$	
Personal	Total due Driver/Coordinator			\$	
	or due company (attach cheque)			or \$	
	Net vanpool operating expense				\$

Driver/Coordinator signature

Vanpool Program Administrator approval

Date Submitted

Date Approved \_\_\_\_\_

# Vanpool Invoice

The amount due is payable to the Driver/  
Coordinator by the first (1st) of the month.  
Cheques should be made payable to  
(Company name).

Vanpool Number	Amount Due
Passenger's Name	
Address	
Driver/Coordinator (print clearly)	
Date	

(Date) from	To
Employee Number	
Department	Phone
Signature	

## Vanpool Payroll Deduction Authorization

I request participation in the vanpool program and  
authorize the company to deduct my share of the  
expenses, as calculated by the company, from my  
pay cheque.

Driver/Coordinator should submit this form at  
program *initiation* and upon the *addition* or  
*termination* of any passenger.

Vanpool Number	Amount of Deduction
Passenger's Name (print clearly)	
Date	
Employee Number	
Driver/Coordinator (print clearly)	
Date	

Effective date to begin or date to stop
Signature
Department
Phone
Signature



# **VANPOOL SUBSCRIPTION AGREEMENT**

(Company Name) is pleased to announce that it is organizing a vanpool program, on a pilot basis, to enable you and your fellow employees to get to work and back in a way that will be more efficient and economical than driving your own cars. If you and a sufficient number of fellow employees living near enough to you to form a convenient and efficient vanpool elect to participate in this program, the Company will attempt to provide a commuter van which will:

1. Pick you up for transportation to work and deliver you to your home or other mutually agreeable location after work on a regular schedule to be determined by the Driver.
2. Continue to operate in the event the Driver is unable to drive; a Back-up driver will be appointed, when needed.
3. Continue to operate during a 60-day grace period if and when the number of passengers has fallen below the minimum load; in this event it is expected that the Driver and the passengers will be able to recruit the additional passenger(s) necessary to meet the minimum of ten (10) passengers before the 60 days has expired.

If you elect to participate you will be expected to:

1. Pay each month's commuter fare to the driver in advance or authorize payroll deduction where available; for this you receive a guaranteed reserved seat on the commuter van. (Note: Prior to the first payment you will receive an invoice showing the amount you are to pay each month; estimated fares are available from the Vanpool Administrator).
2. Notify the Driver in advance whenever you cannot meet the van's scheduled pick-up time; it is your responsibility to be on time for pick-up.
3. Arrange other means to get to and from work if you cannot meet the van schedule on a particular day.
4. Understand that the van must maintain a schedule and that it cannot wait more than 2 minutes for a passenger pick-up.
5. Notify the Driver in advance when you are on sick leave or vacation. (Note: You may arrange for a substitute passenger to take your reserved seat, if he or she lives near or can meet the regular van route.)
6. Notify the Company and the Driver at least 15 days in advance if you elect to withdraw from the commuter vanpool.

If you wish to subscribe to this program under the terms set forth above, please so indicate by signing and dating this agreement and returning it to the Vanpool Administrator. A minimum of ten (10) passengers plus a Driver must be subscribed to a specified route before a van can be ordered. Service would begin upon receipt of the vehicle, which is estimated to require approximately 60 days once the order is placed.

Accepted:

\_\_\_\_\_  
Signature of Employee

\_\_\_\_\_  
Vanpool Administrator

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

# VANPOOL RIDER LIST

Driver

Vanpool Number

Vanpool Route

Date

Parking Space Number

Daily Distance

Address

Home Phone

Work Phone

Name	Address	Home Phone	Work Phone	Pick-up Time
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				

Back-up Drivers

Homebound departure time (or when all riders are aboard)

A.

Automatic Service Maintenance Check List

Checked by	Dept. No.	Odometer Reading	Date	Vehicle No.
Service		Needs Service	Service up to date	Comments
Interval Check		<input type="checkbox"/>	<input type="checkbox"/>	
Battery Water Level		OK <input type="checkbox"/>	ADD <input type="checkbox"/>	
Window Washer Solvent		OK <input type="checkbox"/>	ADD <input type="checkbox"/>	
Tire Pressure		OK <input type="checkbox"/>	ADD <input type="checkbox"/> LF <input type="checkbox"/> RF <input type="checkbox"/> LR <input type="checkbox"/> RR	
Power Steering Fluid		OK <input type="checkbox"/>	ADD <input type="checkbox"/>	
Belts		OK <input type="checkbox"/>	NEED SERVICE <input type="checkbox"/>	
Wipers		OK <input type="checkbox"/>	NEED SERVICE <input type="checkbox"/>	
Radiator		LEVEL OK <input type="checkbox"/>	ADD <input type="checkbox"/>	
Lights		OK <input type="checkbox"/>	NEED SERVICE <input type="checkbox"/>	
Horn		OK <input type="checkbox"/>	NEED SERVICE <input type="checkbox"/>	
Emergency Repair Needed				



B.

## 6000 km Preventative Maintenance Schedule

Invoice No.	Dept. No.	Odometer Reading	Date	Vehicle No.
Service			Comments	
Chassis Lube <input type="checkbox"/> OK <input type="checkbox"/> Lub				
Oil Change <input type="checkbox"/> (✓) SAE _____ Type _____				
Oil Filter Change <input type="checkbox"/> (✓) _____				
Differential <input type="checkbox"/> Level OK <input type="checkbox"/> Add				
Transmission Fluid <input type="checkbox"/> Level OK <input type="checkbox"/> Add				
Service Air Filter <input type="checkbox"/> Clean <input type="checkbox"/> Replace				
Oil Breather Cap <input type="checkbox"/> Clean <input type="checkbox"/> Replace				
Tire Safety Check Condition <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> *Poor *Explain poor rating at right			Pressure Front _____ Rear _____ Spare _____	
Belt Service <input type="checkbox"/> No Service Needed Belts Replaced <input type="checkbox"/> PS <input type="checkbox"/> AC <input type="checkbox"/> Fan <input type="checkbox"/> Emission				
Vision Check – Wipers <input type="checkbox"/> Good <input type="checkbox"/> Replaced				
Washer Solvent <input type="checkbox"/> OK <input type="checkbox"/> Add				
Battery Service Water Level <input type="checkbox"/> OK <input type="checkbox"/> Add      Cable Condition <input type="checkbox"/> Good <input type="checkbox"/> Replaced				
Steering Check Fluid <input type="checkbox"/> OK <input type="checkbox"/> Add Hose <input type="checkbox"/> OK <input type="checkbox"/> Replaced				
Master Cylinder Check Level <input type="checkbox"/> OK <input type="checkbox"/> Add Fluid Cond. <input type="checkbox"/> OK <input type="checkbox"/> Replaced				
Cooling System Check Radiator – Fin Condition <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Degree of Protection _____ % Condition of Cap <input type="checkbox"/> OK <input type="checkbox"/> Replaced Hose Condition – Heater <input type="checkbox"/> OK <input type="checkbox"/> Replaced By Pass <input type="checkbox"/> OK <input type="checkbox"/> Replaced Upper Rad. <input type="checkbox"/> OK <input type="checkbox"/> Replaced Lower Rad. <input type="checkbox"/> OK <input type="checkbox"/> Replaced				
Door Hinge Check Lub      Replace				
Light Safety Check Head Lamp <input type="checkbox"/> OK <input type="checkbox"/> Replaced Signal Lamp <input type="checkbox"/> OK <input type="checkbox"/> Replaced Brake Lamp <input type="checkbox"/> OK <input type="checkbox"/> Replaced Back Up Lamp <input type="checkbox"/> OK <input type="checkbox"/> Replaced Dash Board Lites <input type="checkbox"/> OK <input type="checkbox"/> Replaced				

C.

		Preventative Maintenance Schedule by Kilometre Intervals		Vehicle No.	
				Dept. No.	
		Service Interval	Service Complete	Service	Comments
Date (Service)		Odometer Reading		Invoice No.	
12000		Rotate Tires			
Date		Odometer Reading		Invoice No.	
18000		Check Brakes			
		Repack Wheel Bearings			
		Clean or Replace PCV Valve			
Date		Odometer Reading		Invoice No.	
24000		Tune Up			
		Replace Fuel Filter			
		Replace Air Filter			
		Rotate Tires			
Date		Odometer Reading		Invoice No.	
36000		Inspect & Service Transmission			
		Check Brakes			
		Repack Wheel Bearings			
		Clean or Replace PCV Valve			
		Rotate Tires			
Date		Odometer Reading		Invoice No.	
48000		Tune Up			
		Replace Fuel Filter			
		Replace Air Filter			
		Rotate Tires			
Date		Odometer Reading		Invoice No.	
54000		Check Brakes			
		Repack Wheel Bearings			
		Clean or Replace PCV Valve			

D.

Preventative Maintenance Schedule by Kilometre Intervals

Vehicle No.

Dept.

Service Interval	Service Complete	Service	Comments
Date (Served)		Odometer Reading (At time of service)	Invoice No.
60000		Rotate Tires	
Date		Odometer Reading	Invoice No.
72000		Inspect and Service Transmission	
		Tune Up	
		Replace Fuel Filter	
		Replace Air Filter	
		Check Brakes	
		Repack Wheel Bearings	
		Clean or Replace PCV Valve	
		Rotate Tires	
Date		Odometer Reading	Invoice No.
84000		Rotate Tires	
Date		Odometer Reading	Invoice No.
90000		Check Brakes	
		Repack Wheel Bearings	
		Clean or Replace PCV Valve	
Date		Odometer Reading	Invoice No.
102000		Rotate Tires	
Date		Odometer Reading	Invoice No.
108000		Check Brakes	
		Repack Wheel Bearings	
		Clean or Replace PCV Valve	



#### Maintenance Record

Project Number \_\_\_\_\_ Area \_\_\_\_\_ Page \_\_\_\_ of \_\_\_\_

Purchase Date \_\_\_\_\_ Daily Distance (km) \_\_\_\_\_

[illegible]

\$ \_\_\_\_\_ \$ \_\_\_\_\_

\$ \_\_\_\_\_ \$ \_\_\_\_\_

# 9

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# Appendix 1

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In October 1977, the Ontario Legislature passed an amendment to allow the unregulated operation of carpools crossing municipal boundaries. The exact working of the amendment is given below. It should be noted that the effect of the amendment is to **exclude** carpools as defined in the amendment from The Public Vehicles Act, therefore leaving them unregulated.

## Bill 34, 1977

### An Act to amend The Public Vehicles Act

HER MAJESTY, by and with the advice and consent of the Legislative Assembly of the Province of Ontario, enacts as follows:

1.—(1) Section 1 of *The Public Vehicles Act*, being chapter 392 of the Revised Statutes of Ontario, 1970, as amended by the Statutes of Ontario, 1971, chapter 50, section 74, is further amended by adding thereto the following clause:

s. 1.  
amended

(aa) "car pool vehicle" means a motor vehicle as defined in *The Highway Traffic Act*,

R.S.O. 1970.  
c. 202

- (i) with a seating capacity of not more than twelve persons,
- (ii) while it is operated transporting no more than twelve commuters including the driver, none of whom pay for the transportation more frequently than on a weekly basis,
- (iii) that is not used by any one driver to transport commuters for more than one round trip per day, and
- (iv) the owner, or if the vehicle is subject to a lease, the lessee, of which does not own or lease another car pool vehicle unless he is the employer of a majority of the commuters transported in the vehicles,

but does not include a motor vehicle while being operated by or under contract with a school board or other authority in charge of a school for the transportation of children to or from school.



	(2) Clause <i>g</i> of the said section 1 is amended by inserting after "taxicabs" in the seventh line "car pool vehicles".	s. 1 (g). amended
s. 1 (i). amended	(3) Clause <i>i</i> of the said section 1 is amended by inserting after "Act" in the second line "other than a car pool vehicle".	
Commence- ment	2. This Act comes into force on the day it receives Royal Assent.	
Short Title	3. The short title of this Act is <i>The Public Vehicles Amendment Act, 1977</i> .	

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